

**Probate Committee  
Judicial Conference of Indiana**

December 4, 2009  
Minutes

1. Members present. The following members of the Committee were present: David Bolk, Robert Freese, David Kolger, Thomas Milligan, David Northam, Perry Shipman, and Susan Orr Henderson, Chair.
2. Staff present. Michelle C. Goodman provided the Committee with staff assistance.
3. Approval of minutes. The Committee approved the minutes from the August 2009 meeting.
4. Judicial Education Session. The Committee was asked to develop a Guardianship 101 session for the Spring Judicial College in April. The Committee discussed possible topics, including basic/GAL appointments, jurisdiction, best practices with pro se, and general administration (tickler system, accountings, etc.) The Committee also discussed possible faculty including Judge Freese, Judge Kolger, Judge Schneider (Lake Co.), Judge Pratt, Judge Henderson. The Committee asked staff to report back to the Education Department and see if this meets their goals or if there is something additional that should be considered.
5. Innovations in Probate. The Committee discussed our status on the review of guardianships and requested a report back to the Chief Justice on our progress in reviewing cases and potential solutions to various issues raised by the Committee relating to processing guardianships. The Committee also received a report that the Guardianship Task Force is still meeting and there will be a spring symposium next year.
6. State Bar Probate Section. The Committee received the minutes from the last meeting of the Probate Section. The Committee requested more information on the Uniform Adult Guardianship Act when it becomes available.
7. Probate Deskbook. The Committee continued revising the Adoption section and made a number of revisions. The Committee also completed the review of the Trust sections. The Committee plans to review the following sections at the February meeting: 9.00 Powers of Attorney, 1.01 Probate, Wills, Will Contests, 1.20 Unsupervised Estates, 1.30 Personal Representatives, 1.40 Inventory and Asset Management, 1.70 Inheritance Taxes, 1.80 Wrongful Death. The members responsible for the remaining sections will be sent a submission deadline via email for future meetings.
8. Future meetings. The remaining 2010 meeting schedule is:

Friday, February 19, 2010 at 10 a.m.  
Friday, April 23, 2010 at 10 a.m.  
Friday, June 4, 2010 at 10 a.m.  
Friday, August 6, 2010 at 10 a.m.  
Friday, November 5, 2010 at 1:30 p.m.

All meetings will be held at the Indiana Judicial Center.

Respectfully submitted,

Michelle C. Goodman  
Staff Attorney